

# Re-evaluating your LMS: a case study



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## USING THE LMS: THE CARDIFF MET CONTEXT:

### HELEN THOMAS

Cardiff Metropolitan University moved from the Dynix Library Management System (LMS) to the Talis LMS in 1997. Having started work in 2001 at what was then the University of Wales Institute Cardiff, I was not involved in the original procurement process. This process had been comprehensive and the printed evidence appeared to testify to this, consisting as it did of a large 'tender' folder containing a compendious set of requirements.

The Talis system has, therefore, been in place for over fourteen years. The acquisition in 2011 of Talis by Capita, plus the length of ownership without re-evaluation, occasioned the need for a formal review to be conducted. Other reasons included

- cost: high in comparison with other corporate systems
- future planning: vital in current budgetary climate
- hardware / software changes: uses different platform from majority managed by IT department
- integration: increasingly necessary due to new student records system
- support: support systems / service could be better
- system development: perceived as slow and highly priced

- technological change: hosted and cloud-based services available in LMS market
- technological improvements: other LMSs offering increasing functionality.

The LMS is used by all staff in the Library Division and also by staff in the IT department. It currently integrates with a range of other systems, including SharePoint, the Student System and self-service machines.

## WHY CHANGE LMS?

In the summer of 2011 there was a meeting between the Head of Library Division, Head of IT Division and other staff from the converged Library & IT service, and assessment of the current provision was conducted. As part of this a SWOT analysis was drawn up. *(Please note these are Cardiff Met's particular experiences and do not reflect on the system/supplier as a whole.)*

STRENGTH	WEAKNESS
<ul style="list-style-type: none"> <li>• Established working relationship with Talis</li> <li>• Staff front-end LMS is good</li> <li>• Incumbent system</li> <li>• Integrated with existing local systems</li> <li>• Pricing / current cost and increases known</li> <li>• Reliable</li> <li>• Time and money already invested / spent</li> <li>• Staff and students are familiar with OPAC (online public access catalogue)</li> </ul>	<ul style="list-style-type: none"> <li>• Erratic account management and technical support</li> <li>• Back-end poor</li> <li>• Lack of openness, i.e. our ability to customise or amend data</li> <li>• Integration is difficult and costly</li> <li>• Expensive</li> <li>• Slow and costly development and obsolete architecture</li> <li>• OPAC does not showcase the library</li> </ul>
OPPORTUNITY	THREAT
<ul style="list-style-type: none"> <li>• Capita takeover could improve speed of development.</li> <li>• We could work as early adopter / beta tester and improve system development.</li> <li>• We have increased ability to exploit the products we already own.</li> </ul>	<ul style="list-style-type: none"> <li>• Capita takeover could diminish support services further.</li> <li>• Move towards hosted service could leave us with less control of our data, increase our costs and lead to reduced internal technical expertise.</li> <li>• Capita's focus is mainly governmental and they are unproven in higher education.</li> <li>• Slow development: being left behind in comparison with competitors.</li> </ul>

The range of weaknesses and threats led to an agreement that a project team should be convened to begin a review.

#### **PROJECT STRUCTURE**

A team of four staff was appointed, comprising staff from different areas and levels of the library service. This provided a breadth of experience and allowed the project to call on knowledge from across the division, including specialists from areas such as cataloguing. The team were

- Bethan Bartholomew (Senior Information Assistant)
- Luisa Caceres-Soto (Information Adviser)
- Laura Moss (Information Assistant)
- Helen Thomas (Central Services Librarian)

For Bethan and Laura, this was their first involvement in a formal project, their first experience of system procurement and their first experience of analysis of LMS. This was useful in that it brought an unbiased and fresh viewpoint into the mix plus experience of other non-library-focused IT systems.

A project plan was created articulating the tasks required in order to provide, by March 2012,

- an evaluation of the university's current LMS
- recommended options for the continued delivery of library services
- the relative advantages and disadvantages of these options.

The main elements were identifying general LMS requirements, including capturing local user requirements; identifying all possible viable LMS systems, including supplier visits and visits to other higher education institutions; conducting an appraisal of relevant systems against requirements; and producing recommendations to put before senior management.

#### **CAPTURING REQUIREMENTS**

We began by reviewing the United Kingdom Core Specification for LMS, UKCS Version 3 (2007). Though now showing its age, this still provides a good basis for requirements and stimulated conversations with staff involved in acquisitions, cataloguing and circulation.

Focus groups comprising library and IT staff used a range of questions that were specifically designed to elicit user requirements. They

were open in nature and helped produce varied responses. It was interesting that responses matched the changed higher education landscape, e.g. increased demand for management information in light of the need to justify spending decisions.

Cardiff Met developments are required to be influenced by 'the student voice', so input not only from staff directly affected by the system but also from academic staff and students was obtained. This was conducted through an online survey embedded into the OPAC. The results from this will be supplemented by focus groups as we found the student feedback restricted in value because of the low number of respondents.

The requirements captured across this consultation helped inform the next steps.

#### **NEXT STEPS: BETHAN BARTHOLOMEW**

I joined Cardiff Met at the end of November 2011 as a Senior Information Assistant. A significant part of my role is to look at the administration and configuration of the Library Management System. When I started in the role I was completely new to the university and to libraries in general and it has been a massive learning curve for me, not only getting to grips with the LMS but also getting my head around the library jargon – I can now explain with reasonable confidence what ILL (interlibrary loan) and SED (secure electronic delivery) stand for.

In my first few weeks I met with some of the IT staff who are involved with the LMS and I was introduced to words like the cron, daemons, SQL and 'scripts' – which frankly could have been in a foreign language! Then there were the library terms to tackle such as QMW (quick manage work), MARC record, DOC DEL (I originally thought this was a system rather than standing for document delivery), COPAC and SCOUNL. Even terms that I now use on a daily basis such as OPAC and LMS were baffling to me. Seemingly simple phrases like 'last useful date' were confusing my already overloaded brain and when staff referred to kiosk machines I assumed these were the self-service machines – how foolish!

Alongside the work I carry out on the LMS, I am also a member of an LMS review team which has invited a number of suppliers to come to Cardiff Met over the past few months to give demonstrations of their systems; we have also visited other institutions to see how their systems are used.

## SUPPLIER VISITS

From the perspective of someone brand new to library systems, it has been incredibly valuable to attend the presentations. I was completely unaware of the variety of systems available, not to mention the question of whether to go for proprietary or open source, and looking at the 'cloud'! I had initially been concentrating so heavily on understanding Cardiff Met's system that I had not given much thought to the fact that there would be such a range on offer: when I was a student I had always assumed that all universities used the same system.

We have had demonstrations from

- Capita – Chorus
- Ex Libris – Alma
- Innovative Interfaces – Sierra
- PTFS of the Koha and Evergreen systems
- OCLC – WorldShare
- Sirsi Dynix – Symphony

It has been really fascinating to learn about what each of these systems can offer and I've been particularly interested in the way open source systems are developed by a community of users. I've also been surprised by the enthusiasm of some of the suppliers to adopt a similar approach to development by using their customers to prioritise updates and allowing customers to develop their systems themselves.

A few systems stood out for me: WorldShare, Alma and Sierra have moved away from looking at the LMS as an individual system and are instead considering all the services that a library might need and offering them as an integrated package. This certainly sounds like the way forward to me, especially as developments in areas such as mobile communications and electronic resources seem to be moving forward very quickly and if a system is unable to cope with change, then how long is it likely to remain fit for purpose? The new systems on offer seem to be fluid; they are not necessarily being promoted as finished products but as systems that will evolve with users' needs. Open source systems also stood out, because they offer the chance to develop systems alongside other universities, sharing knowledge and learning from different processes; there also seems to be more opportunity for personalising a system to suit a specific environment.

## INSTITUTIONAL VISITS

The LMS review team visited three universities to see how they manage their systems. The first was an open source project where some of the staff seemed very satisfied with the system whereas others were decidedly underwhelmed. From talking to the staff it was clear that they had worked with the user community and implementation team to develop specific projects unique to them, but on the downside there were also some elements of the system that have not yet been developed to the standard some staff had experienced with their previous LMS.

At Cardiff Met we currently refer any server / scripting problems to our IT department and then liaise with them and Capita; it was a very different story at the second university, where responsibility for the LMS did not lie with the IT department at all: their systems librarian takes care of the whole LMS. This sounded like a one-stop shop for queries about the system and definitely provided food for thought.

Our third visit was to a university that had recently moved to an externally hosted system. What was interesting there was the apparent ease with which the move had been completed, with very little disruption to staff and library users. One of our options is to remain with our current system but move away from being locally hosted, so it was useful to hear a first-hand account of some of their experiences.

## WHAT NOW?

The LMS review team will be presenting the options available for the LMS soon and I can see the value in all the options – staying with the current system (possibly making the move into the cloud) or changing to a completely different system whether open source or proprietary. One of the main advantages I can see of sticking with our current system is that the staff are already highly skilled at using the system and know its quirks well. Admittedly we all get frustrated at times and, as one of the staff consulted commented, is it a case of 'better the devil you know'? I'm not entirely sure it is, as moving to a new system would be the perfect opportunity to review how the original system was set up and the rules, permissions and processes used. And although we can start, and have indeed started reviewing some of these aspects already, a new system would also provide an opportunity to start with a clean slate. The visits to other universities

have, however, highlighted the fact that no one system is likely to be perfect, and whatever we decide to do we shall need to revisit the issue in the not too distant future, either to keep up with developments or as part of a larger shared service project.

From my perspective, regardless of the option we choose, being a part of the review team has been a great initiation into the library world.